upland Altify

Release Notes

Version 9.7

Contents

Release Overview

This small release makes it easier for you to manage your account divisions. Previously, divisions were managed in account plans. Now, you can manage divisions from the Account Summary launchpad on an Account record, or from within an account plan. Also, a new search option makes it easier to pull contacts from a specific division map into another relationship map.

A division is typically a smaller service unit or business unit within an account. By providing the same features as an account (row on the opportunity map, relationship map, insight map, etc.), divisions allow you to accurately map your customers' buying structures, without restriction to Salesforce Account records.

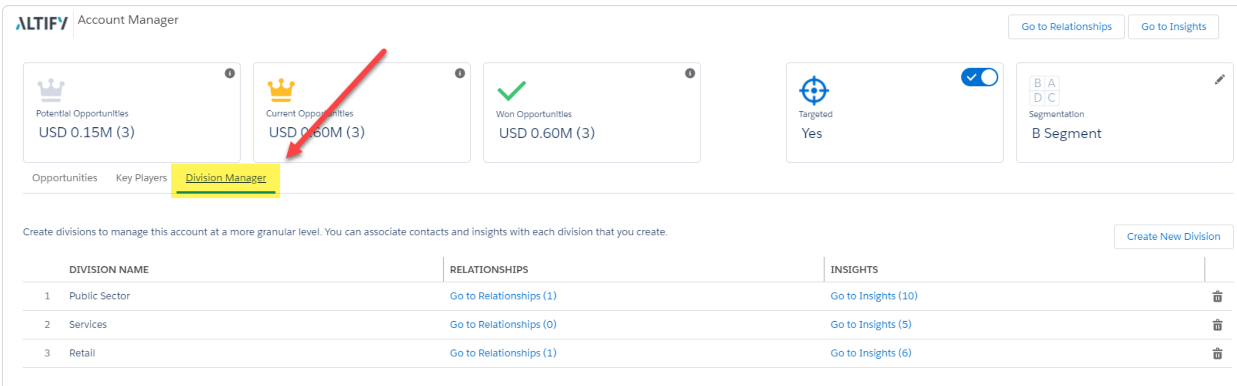
Also delivered with this release, an inline help link that provides guidance on structuring your account plans.

Account Manager

Division Management

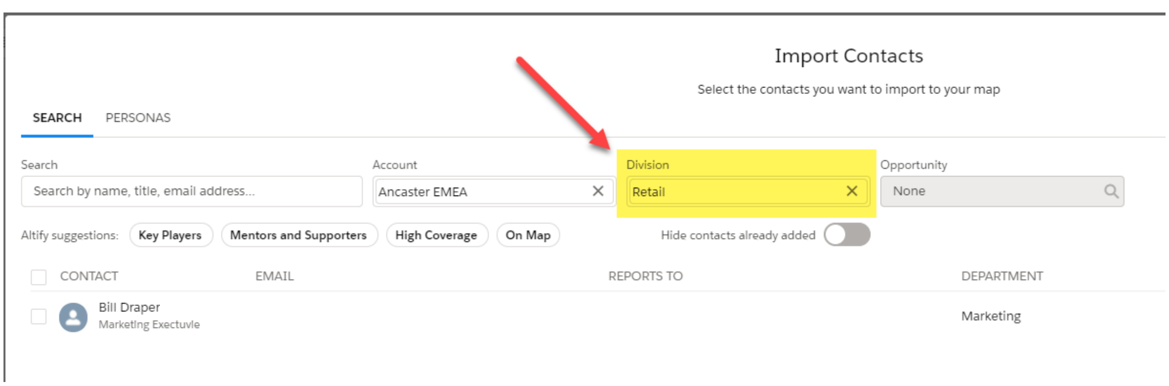
Division Manager on the Account Summary launchpad

View, create, rename or delete divisions on the Account Summary launchpad, or on the Overview tab in an account plan. For more information, see Account Summary Launchpad.



Division search option in Relationship Map imports

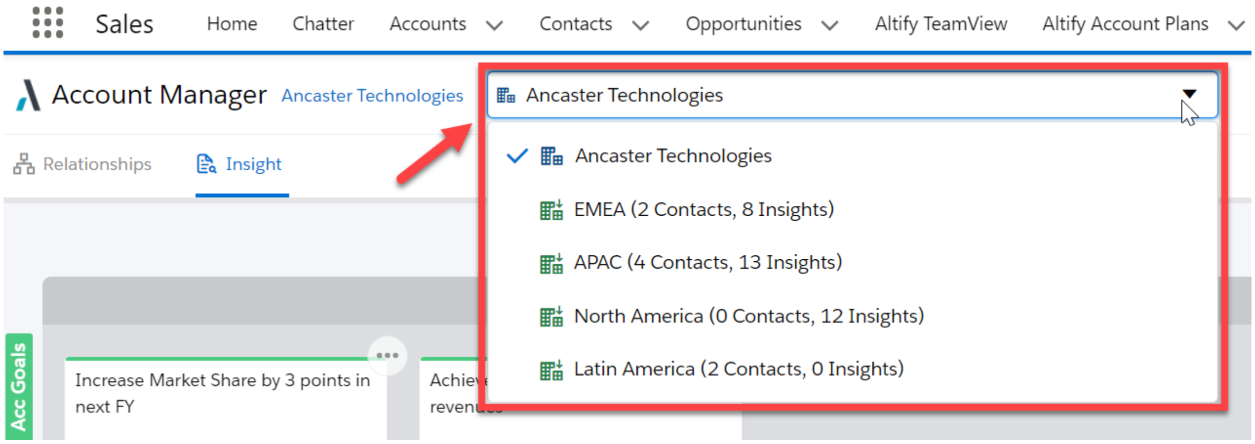
A division search option is available when you are importing contacts into a relationship map. With the ability to view and select contacts from a specific account division, tasks such as merging divisions can be completed quickly. For more information, see Adding Existing Contacts.



Division info on Relationship Map and Insight Map drop-down menus [9.7.23]

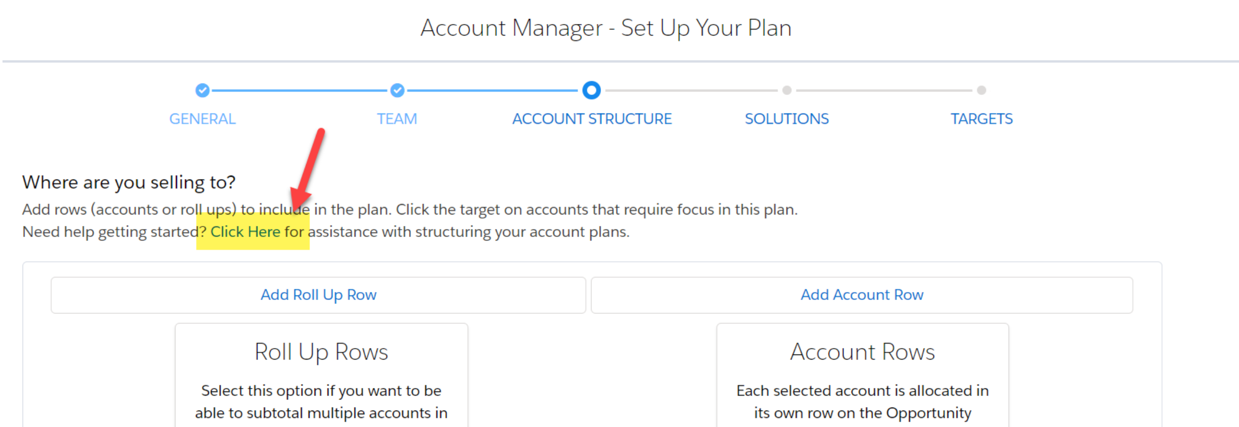
The number of relationship map contacts and insights saved against each account division is now provided on the division drop-down menu on relationship maps and insight maps.

The example below shows the updated menu on an insight map.



Assistance for Account Planners

A new in-product link brings users to a helpful article on how to get started with their account plans ([How should I structure my account plan?]()).



If required, an admin can customize this link for each type of account plan.

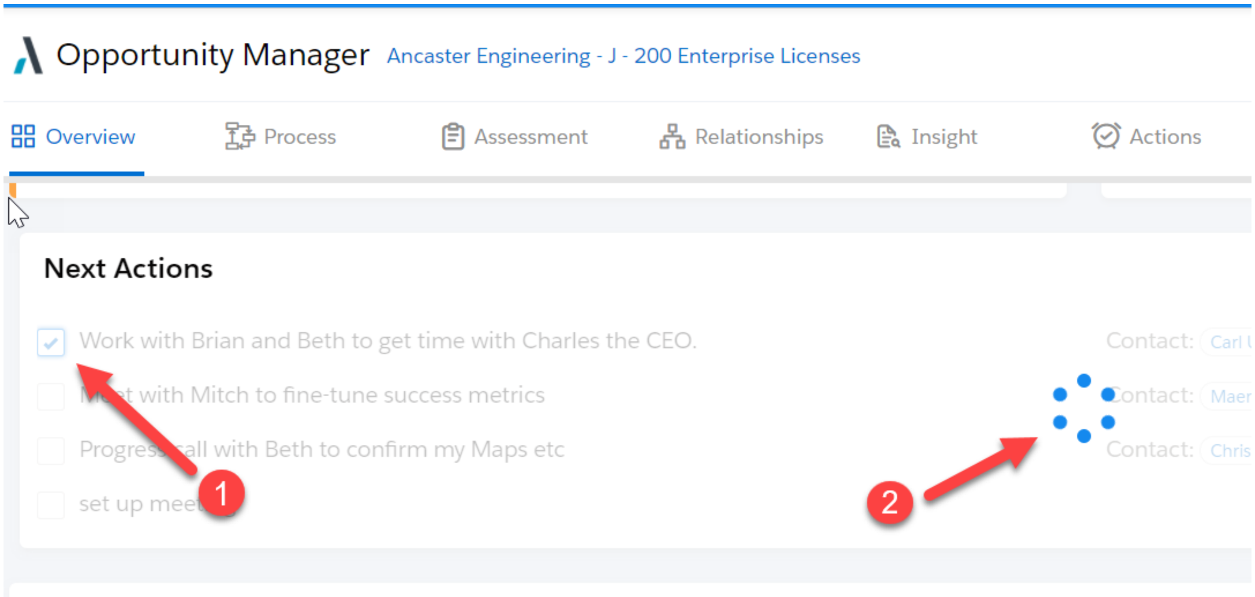
Opportunity Manager

New Custom Setting to Regulate Completion of Actions on Overview Page [9.7.13]

Users were experiencing error messages when marking multiple actions as complete, or repeatedly clicking the check box for a single action, in the Next Actions section on the Overview tab.

By enabling a new Altify Core Setting, *Enable Action Spinner* [Temp3], the potential issue is avoided. A spinner is displayed when an action is marked as complete, allowing Altify Opportunity Manager the second or two to complete the action before the user can select another action.

In the example shown below, the user marks the action 'Work with Brian and Beth to get time with Charles the CEO' as complete (**1**) and a spinner is subsequently displayed while Altify completes the action (**2**).



Note: Enabling this setting will reduce responsiveness on the Overview page. Therefore, we recommend that only customers who are experiencing problems with completing actions should enable the setting.

Relationship Maps

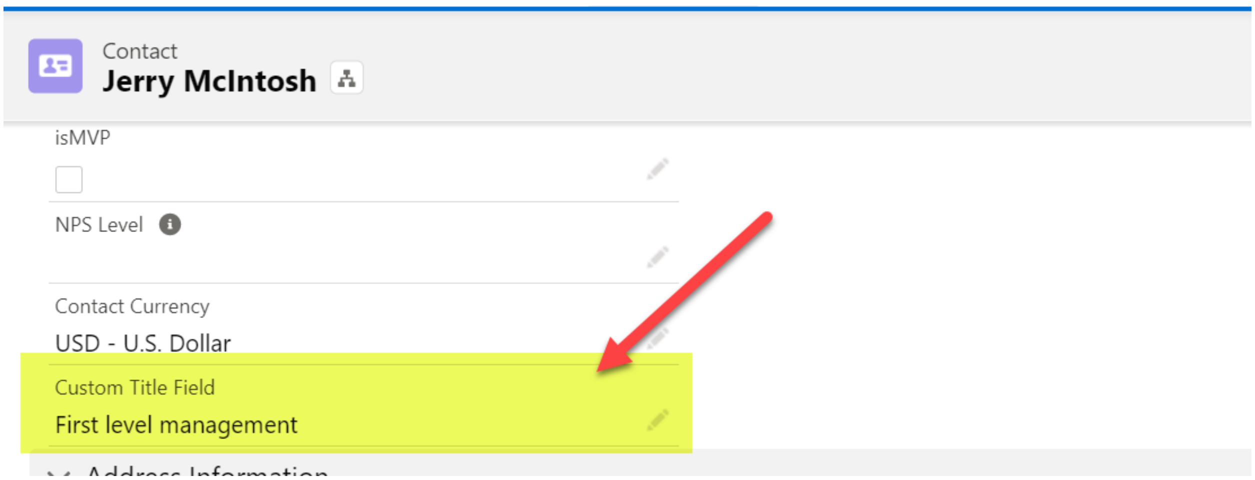
Replacing Title Field with a Custom Field [9.7.17]

By default, the Title field on the Contact record is displayed on Altify Relationship Maps. It appears, for example, on the contact card, on the details panel, in the list view and all export outputs.

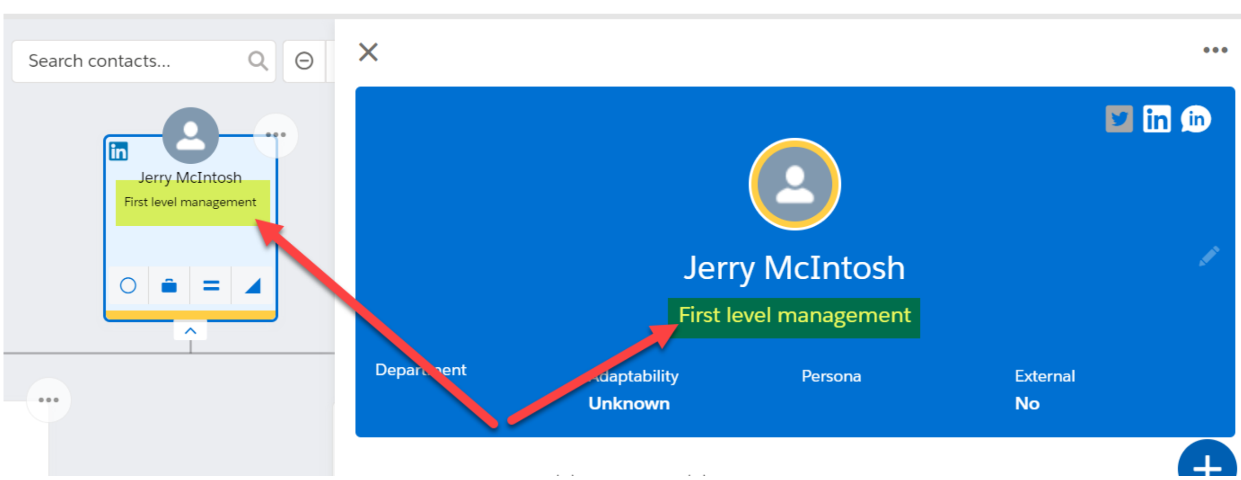
The Title field can now be replaced with a custom field on the Contact record. This is achieved by simply pasting the API name of the relevant custom field into a new Altify Core Setting: *Contact Title Field* [TempStr3].

In the example below, a custom field (Custom Title Field) is employed as the *Contact Title Field*.

On the Contact record:



The value for Custom Title Field is now displayed on relationship maps.



Notes

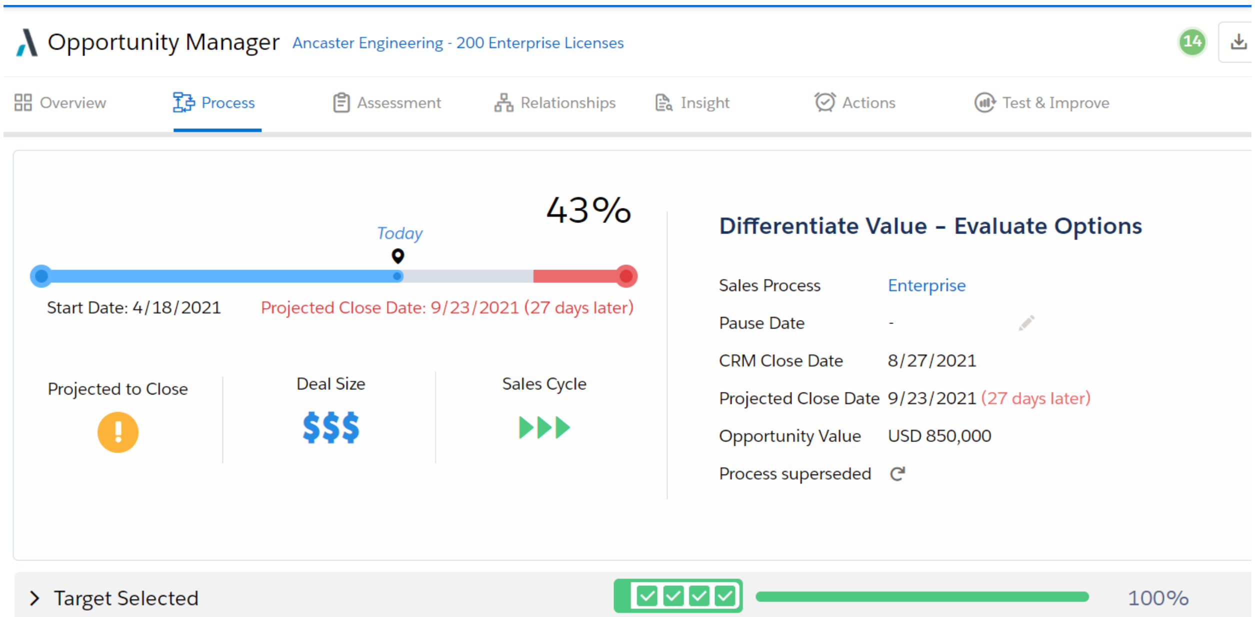
- Different types of custom field can be employed, such as a text field or a picklist.
- Unlike the default Title field, the value for the *Contact Title Field* cannot be updated in a relationship map – it can only be edited on the Contact record.

Sales Process Manager

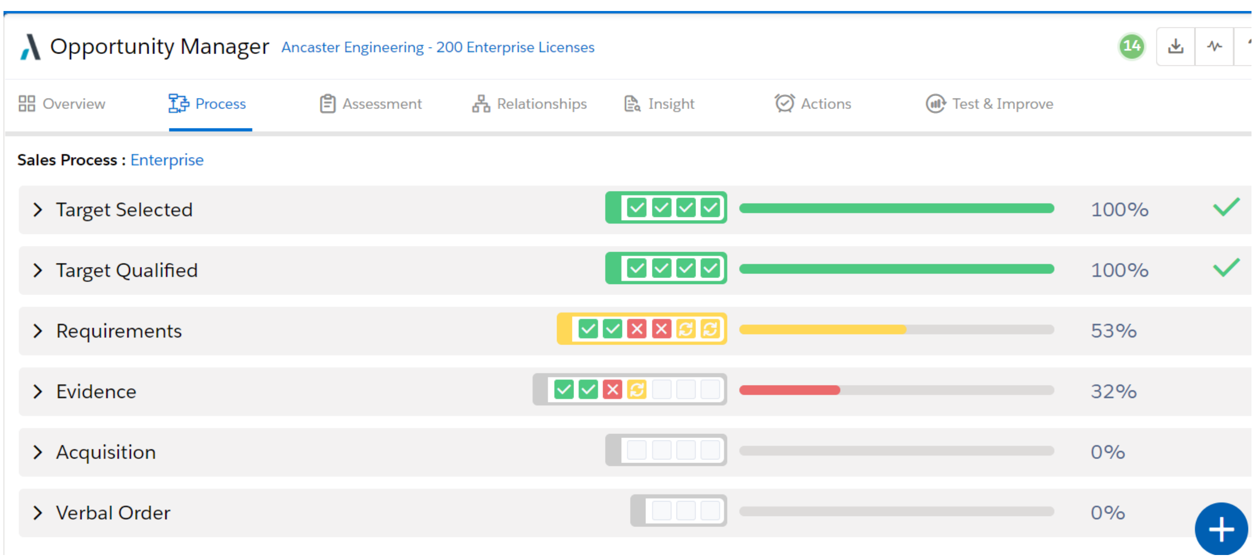
Switch Off Progress Bar Section [9.7.19]

A new Altify Core Setting, *Disable Sales Process Overview* [Temp4], toggles the progress bar section on the Progress tab in Opportunity Manager.

The progress bar is displayed when the setting is blank.



When the setting is checked, the progress bar is not displayed.

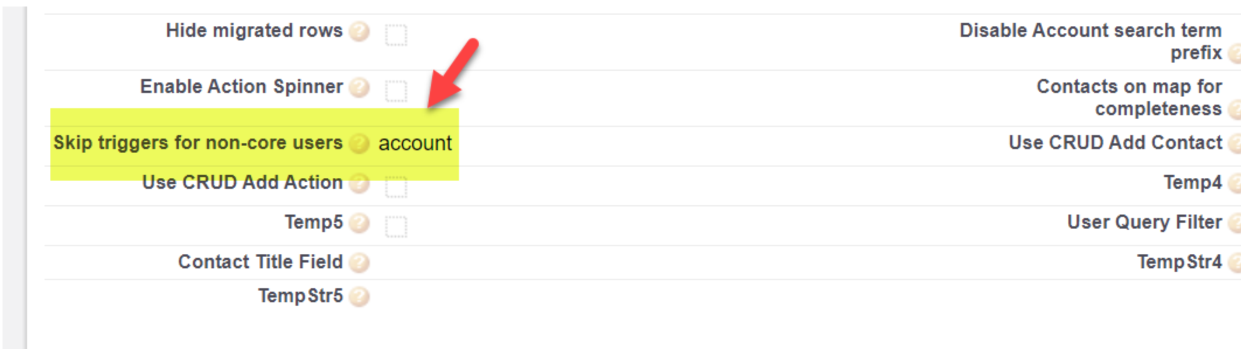


Core Configuration

Disabling Triggers for non-Altify Users [9.7.16]

A new Altify Core Setting, *Skip triggers for non-core users* [TempStr2], allows an administrator to disable specific triggers for users who do not have an Altify License.

In the example below, the ‘Account’ trigger is disabled when a user without an Altify license creates or updates an Account record in Salesforce. In this scenario, if a user without an Altify license creates an Account record, it will not be available to add to an account plan.



Triggers are entered as a comma-separated list, e.g. ‘account,opportunity,opportunitycontactrole,task’.

Note: This setting should only be enabled with the guidance of Upland Support.